



SMARTi Enterprise Report Management

The host computer in your organization generates print output - usually with forms (carriage) control that instructs the printer how to format the pages. SMARTi ERM allows for the definition of the layout of computer-generated documents. The resulting layout template allows SMARTi ERM to intelligently extract information from the print file. This index data is used to locate the documents by the user population.

A SMARTi database is designed to hold the index data. Each unique report or document type is defined as an application. During application setup, the layout or presentation of the report is defined. There are typically two types of electronic reports: computer listing paper, often referred to as greenbar in modern times; or a form that would typically be printed onto a form, statement, purchase order, or invoice stock paper.

The form overlay feature is used to allow documents to be viewed as they would appear on pre-printed forms. For example, if the document is a bank statement, electricity bill or a company invoice, then the overlay template is created with that type of document and when viewed, appears and behaves identical to the printed materials. The one exception to the commonality with the printed material is the ability to search and mine your data when locating the match(es) to your request, no matter the volume or data search complexity.

Using the SMARTi ERM database administration station, the system administrator creates SMARTi databases to store the various report (or application) types. SMARTi provides document search with document types and folders that may be designed to represent the business solution for your department, division, project, subsidiary or entire corporation.

Reports may consist of hundreds, thousands, or even millions of pages of detail. To simplify retrieval, SMARTi ERM can segment the report into sub-documents. For example, when reviewing a general ledger report containing hundreds of account numbers, defining the account number as an index field will instruct SMARTi ERM to consider each account's activity as a separate document even though it physically shares the report page with other account numbers.

SMARTi ERM processes the reports - it captures, sorts, and indexes the print spool files from various host machines or platforms. The process is even further accelerated with the ability to process capture routines during off-peak hours using the SMARTi event manager in a lights out operation.

Once the data capture process is complete, the documents are readily available for use in the daily business routine. Reports, statements, invoices or any other electronic document may be retrieved, viewed and distributed by workflow, print, fax, email or export. One of the unique qualities of SMARTi ERM is the ability to master selected reports, associated database indexes and the complete SMARTi retrieval engine to a self-contained CD.

Searching for information is fast and easy. SMARTi ERM permits unlimited document types to be created. Each document type has data fields associated with it. Then each, any, or all data may be used to find a document or report. Reports may also be searched by text content instead of pre-determined index fields.

Queries may be defined as such when the user is requested to enter some information or characteristic of the report or document required. Once the data is entered, the results are presented distinguishing each document type or report that has been found to match. Queries may be constructed and used to find related documents - in a banking application the research department may examine the report detailing cleared account activity. Ideally, it would be most helpful to review the customers' statements and cancelled checks. In an accounting function challenged with customer collections, the accounts overdue report lists customers' names, specific invoices, amounts, perhaps even days overdue. To enhance the chances of collection and to be prepared, additional support materials assisting in the process would be the customer's invoice, the monthly statement, and perhaps the original purchase order.

For convenience, SMARTi displays the specific data you requested when viewing a report or a statement. Should the document type require a graphical presentation - such as a statement, invoice, or a bill - then the appearance may be identical to the printed material, complete with forms overlay. With certain types of print files, such as IBM AFP, HP PCL, Xerox Metacode, DJDE or Adobe PDF, graphical form information is embedded within the print file itself and can be printed on a laser printer on blank paper. SMARTi ERM has the ability to interpret these print files to create exact replicas of printed documents without the need for a separate form overlay.